RJ Reynolds
Tobacco Company

2110
WINSTON-SALEM

**Gary W. Overfelt**
**Region Operations Manager**
**8100 North Point Blvd.**
**Winston Salem, NC. 27105**
**Office Phone (910) 741-7704**
**Fax Number (910) 741-8271**

April 14, 1997

To: John Boehm

Subject: **Evaluation of ROU Process**

Enclosed are the combined thoughts of the coordinators and myself on the above subject. As we have involved to the New Sales Organization the ROU has changed dramatically since it's inception. Each unit now is servicing more clients (representatives, managers, direct accounts, chain headquarters, retail accounts, and indirect accounts) than was originally studied while providing a higher level of service in today's environment. It because of our efforts to provide these higher service levels we are allowing our management team to be on the street more frequently and address business issues.

The ROU and ROM provide invaluable assistance and knowledge to all client base providing strategic and logistic direction to assist our sales team in accomplishing its objectives. We are the "RJR Encyclopedia of Knowledge" and must be prepared to know and effectively communicate, anything and everything, to everyone at their beckon call. It has always been perceived the ROU and ROM are primarily administration and clerical positions, in our organization, and do not have any strategic or selling accountabilities. This is not exactly true, as we are selling product to direct accounts on a daily basis (product for promotions, premiums, POS, selling materials, etc.) selling managers on policy and procedure and strategic initiatives being worked in region, selling representatives on effective communication and initiatives, assisting management with strategic development of region plans and offering recommendations and solutions to daily activities which are extremely important to the final results and accomplishments our region obtains. Selling is defined as "transferring or rendering services in the exchange for money or to persuade or induce to buy a service or good". In reality this is what the ROU and ROM provide the region.

It goes without saying we are a valuable link to the success of all our objectives and appreciated by our client base. It may be helpful, if someone spent the appropriate time with our client base and use the "Discovery Process" to really determine how we are a selling agent in each region. I honestly feel this may change the perception of many executives who still feel we are administration employees who are process driven, and clerical clones who are told what to accomplish rather than being part of the accomplishments.

If you require further information please contact me.

Sincerely,

*Gary*
Gary Overfelt
ccWFT

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## Gary Overfelt - 2110

**Additional duties offered by the Winston Salem ROU:**

- Preparing Workplan information for the REGION. Streamlining contents to the selling arm and execution arm. In addition, preparation of Workplan packets for each direct account to prepare for VAP ordering and delivery of promotional product, premiums, POS and standard product.
- Preparation of Logistics delivery schedules for national and region promotions with direct accounts (SME and Local Opportunity Events)
- Preparation of General Shipments locators to augment delivery and execution of DSD and DOD for promotional programs.
- Management of product forecasting for Region stickering program and other non forecasted promotional product requirements.
- Management and preparation of promotional tracking information (performance audits) for management. Supplied on a monthly basis, by direct account, to ensure direct account has met the desired delivery commitment dates, approval of VAP/DPC payments and timely posting of activities.
- Manage and train all region employees on using the allocation model for retail stores in their assignments and divisions. Educate employees on the methodology and proper utilization of these resources when twiking numbers in preparation for building VAP templates.
- Create and print separate templates for each promotion by Chain for KAM's/AM's, SR/RR by assignments, and direct account store templates. Sort and mail to appropriate personnel.
- Make/input adjustments in BPE allocation model based on input supplied from field sales.
- Provide allocations for future national and promotions to home office, based on the allocation model and knowledge of market. Provide AMO with information upon request.
- Monitor usage of all promotions and ensure timely ordering, delivery and execution during their specified period.
- Handle inquiries from direct accounts and field sales relative to Partners payments and general information when called upon.
- Prepare Partners payments at the end of each payment period and approve payments in the system.
- Manage and present Workplan information and allocations at region workplan meetings.
- Provide expertise to management team on all systems utilized in the field.
- Point person for gathering and compiling information when requested from sales representatives to develop plans and strategies.
- Prepare templates for additional unscheduled workplan promotions when notified by the company
- Assist customer service with reeducation of residual promotional product remaining in bonded warehouses when called upon. Make all arrangements to have product shipped and sold to accounts.
- Handle home office requests to visit direct accounts.
- Manage PD I and fixture budget in region. Monitor fixture requests from account managers and sales representative to ensure they follow guidelines. Communicate with managers when guidelines are no met.
- Establish allocations of POS/PDI by division based on a geographic needs.
- Serve as an expert on merchandising parts and pieces to field sales
- Monitor operations budget and inform RSM when expenses are above monthly usage.
- Monitor draft and voucher requests to ensure accuracy in back up data and spending in region.

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- Develop region policy and procedure with assistance of management and ROU team members.

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- Conduct audits of retail trade to ensure timely delivery of promotions by direct accounts on VAP/DPC
- Conduct audits of retail stores to ensure accuracy in paying for price reductions.
- Assist managers with preparation of meeting books for division meetings.
- Assist managers with special requests for scroll lists for telemarketing programs utilized in their divisions
- Prepare prebooking forms and other useful communication properties to assist region personnel.
- Involved in continuos testing of new system updates prior to being rolled to field.
- Manage strategic and tactical portions of SME programs in Region to include the following:
  - Winston Cup and Smoking Joe's Racing Show Cars Bookings
  - Winston Cup and Smoking Joe's Racing Simulators Bookings
  - Winston Cup Event coordinator for VIP Suite Requests
  - Region SME Program
  - Promotions and POS requirements for SME events
- Recruiting and interviewing for region and home office positions.
- Training of administration duties for all region personnel. This includes the following:
  - Systems Training
  - SIS. SMS. TPS, AIM, Software Applications
  - Voucher Requests, Draft Writing, Expense Reporting
  - Materials requisitions
  - Audit Procedures for Buydowns
  - HRIS Information
  - Lap Top/Poqet Training
- Management of contract data entry, SIS information, and voucher requests for chain offices in region.
- Handling retailer requests via phone inquirers and written correspondence. (Consumer relations & Coupon redemption.
- Condense and compile promotional information form T14 and T19 for RSM to measure execution and its affect on volume and SOM.
- Preparation of order forms and policy and procedure to ensure timely delivery and cost effective usage of materials to maintain 3p's.
- Develop and prepare retailers mailings to assist with timing of promotions being delivered and notifying retailers of upcoming promotional activity.
- Request AIM data for sales representatives..
- Manage unassigned accounts in AIM.
- Manage Third Party Installations for region.
- Manage scheduling of part time employees in Winston Salem division.
- Manage warehousing, shipping, receiving, and tracking of the following properties in region:
  - Convention Booth
  - Winston Balloon
  - Doral Balloon
  - Conversion Tents
- Assist RBM in gathering of information for monthly status on measurable programs for the region and divisions.
- Condense many reports to a user friendly format versus those provided by the systems to include:
  - Monthly report 5

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Promotion execution reports
Merchandising report

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- Provide Datagrab scroll lists to better evaluate business issues within divisions.
- First line of inquiry for, Management and Representatives, from policy and procedure to interpretation of all programs being offered by RJR. Must be knowledgeable in all aspects of Company strategies and be confident in providing or obtaining answers to insure proper understanding by the field sales team.

These are just a few items the Winston Salem ROU and ROM are faced with in our new Sales Organization.

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